Executive Agency Legislative System

Prepared by

The Division of Financial Management
Executive Office of the Governor
State of Idaho
July 2004

Reminder:

DUE DATES FOR 2004

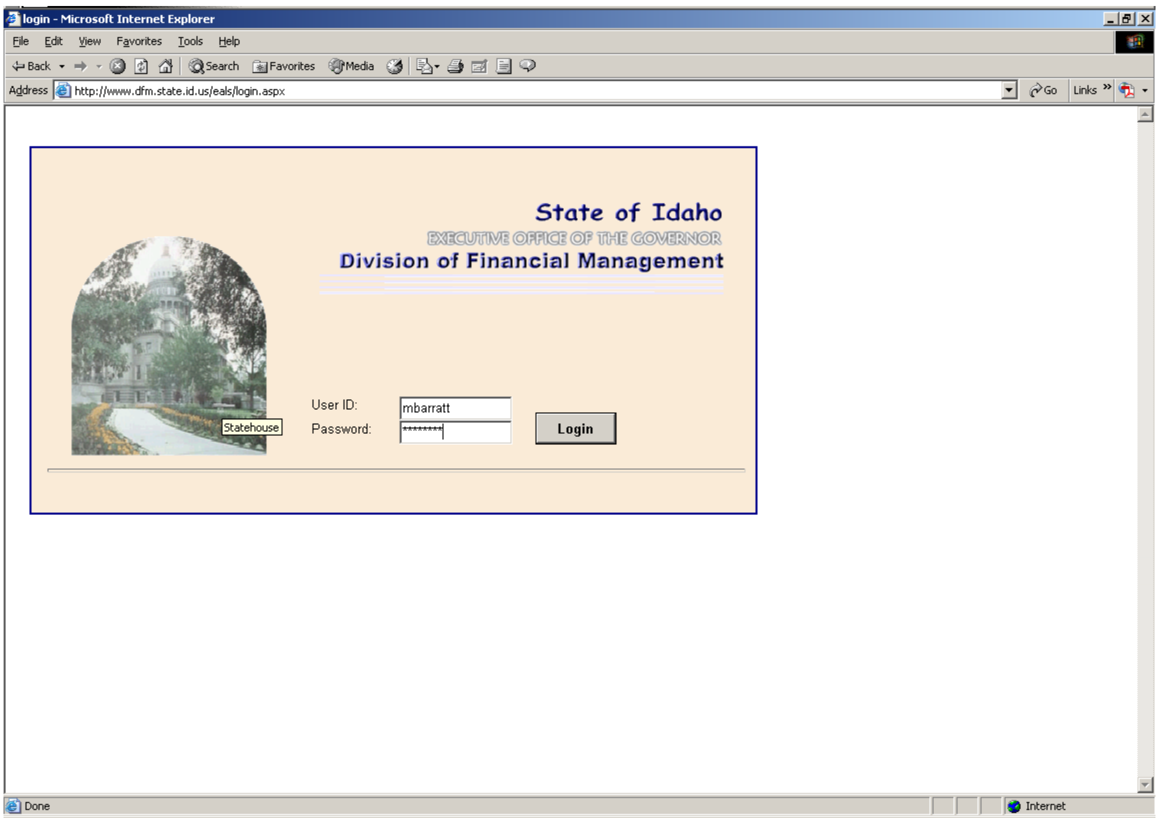
August 2	Legislative Idea Forms are due to DFM.
August	The Governor's office and DFM will review the Idea Forms.
September 3	Agencies will be notified via e-mail, of approval or disapproval of ideas.
September 24	Proposed legislation is due to DFM –Legislation Proposal Form and Statement of Purpose/Fiscal Note
O**ctober 12**	Proposed legislation is due to LSO.
November 1	Bills returned to agency for review and final changes.
December 1	**Final date for any changes to legislation.**

Accessing the Executive Agency Legislative System

This manual has been put together to assist agencies, given step-by-step instructions, on how to utilize the Executive Agency Legislation System (EALS). If you have any questions about your idea or proposal please contact your DFM analyst.

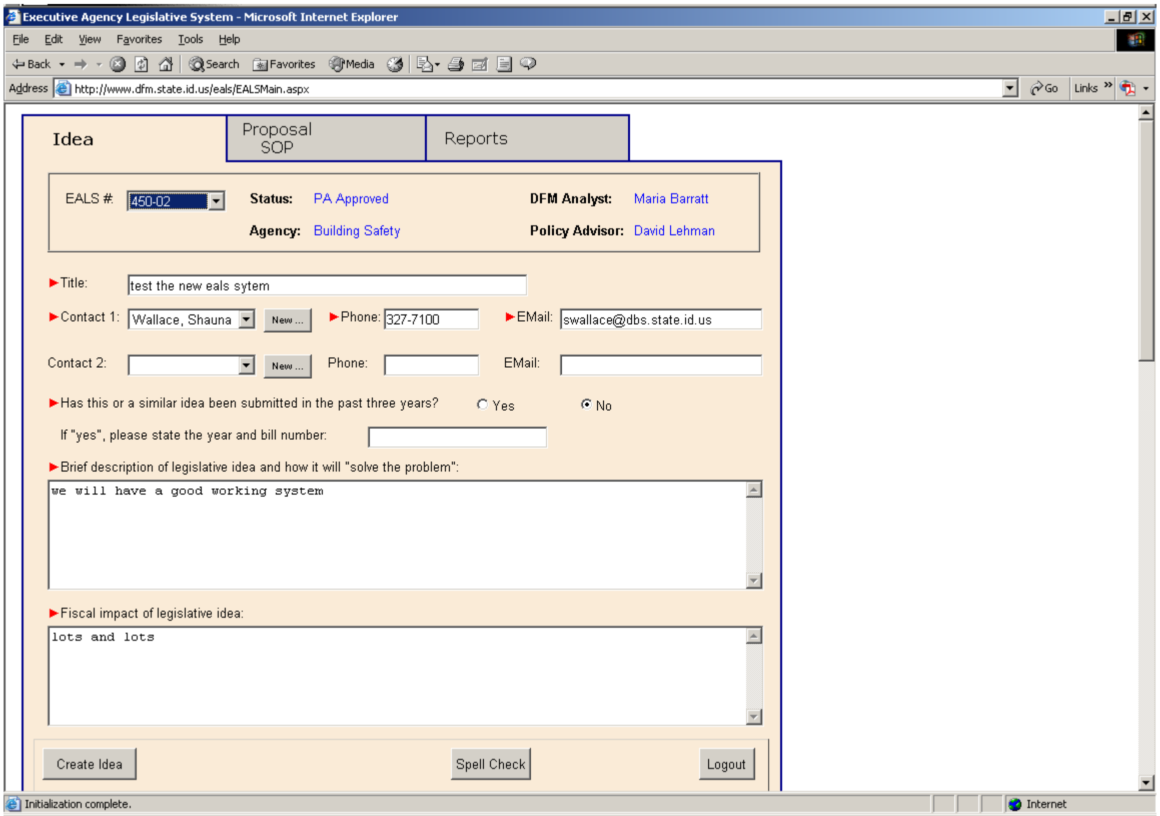
The automated EALS can be accessed at http://www.dfm.state.id.us/eals.

The first screen to appear will be the login screen. Enter your user ID and password. If you need a user ID and password please contact Anita Hamann at 334-3439 or e-mail at ahamann@dfm.state.id.us.



The Legislative Idea

The EALS is broken into separate tabs for each function: Idea, Proposal, and a Reports page.



The system will open with the first Idea submitted. If you haven't submitted any ideas yet, the screen will be blank.

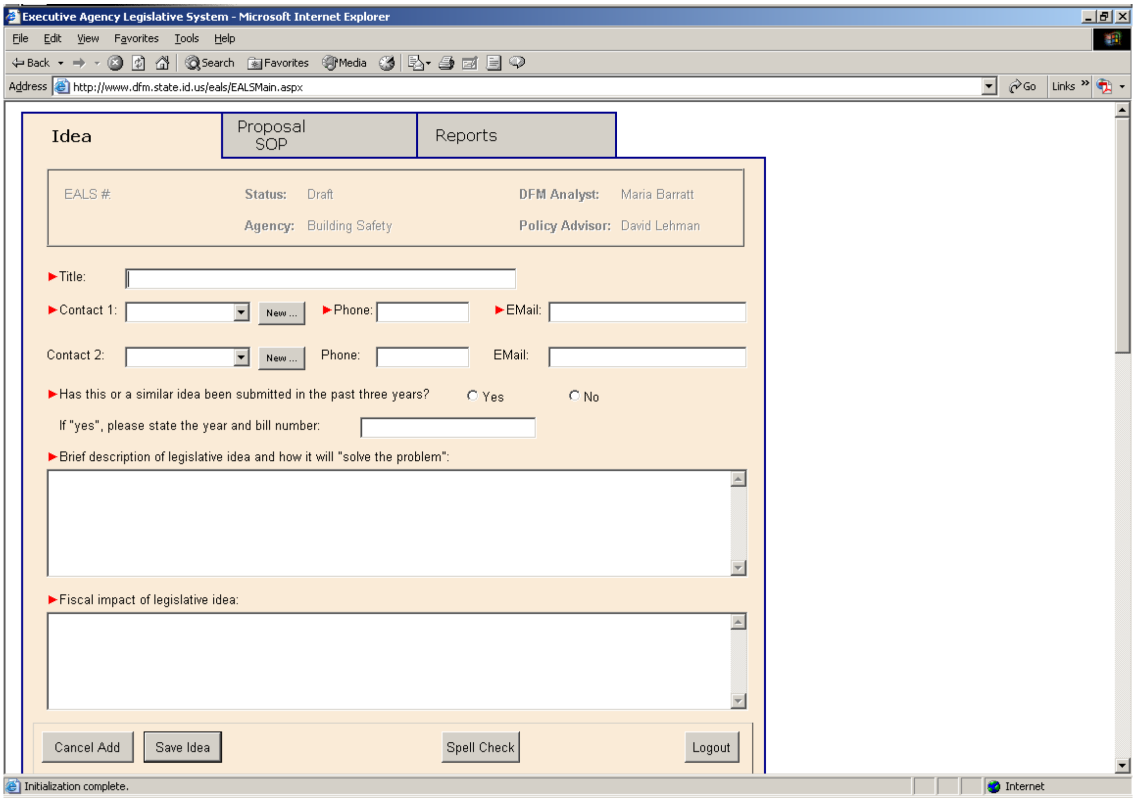
The first step is to select the radio button titled "Create Idea". This will bring up a new blank screen for data input.

The system will automatically assign an EALS number to each new idea. The new number will be assigned when you select the "Save Idea" button. You can go back into the idea as many times as you like for changes and/or updates, and save the new data each time.

Once an idea is saved for the first time, as new series of radio buttons will appear at the bottom of the box. These buttons include the "Submit Idea" and "Delete Idea" button.

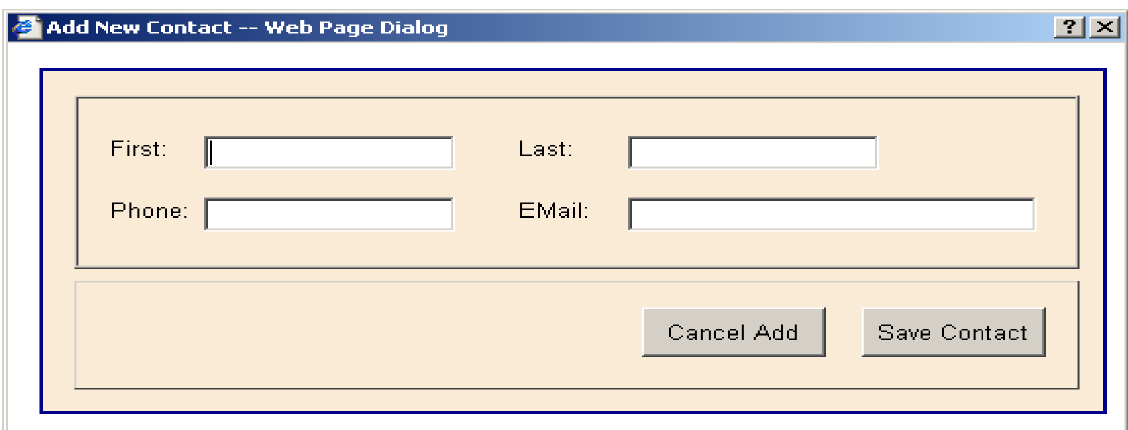
Once the "submit idea" button has been selected, no changes can be made to the Idea by the agency. It has now been submitted to DFM for review.

When creating a new idea, all required information has a red arrow ▶ next to the text box. The system will not allow you to move forward without filling in these boxes.



Title: The title should be descriptive of the idea. It does not need to be lengthy or tell the whole story, but give an indication of what the idea is going to address.

Contact: Only one contact is required, but agencies have the option of listing two contacts. This system will allow you to create a list of contacts that will be available by selecting the drop down arrow. This allows agencies to only have to enter the contact information once.



Select the “new” radio button and a new dialogue box will appear. Enter the information for the name, phone number and email. Select save contact. This contact will now be able to be selected from the drop down arrow next to the contact text box. The phone and email will auto fill once you select a contact name.

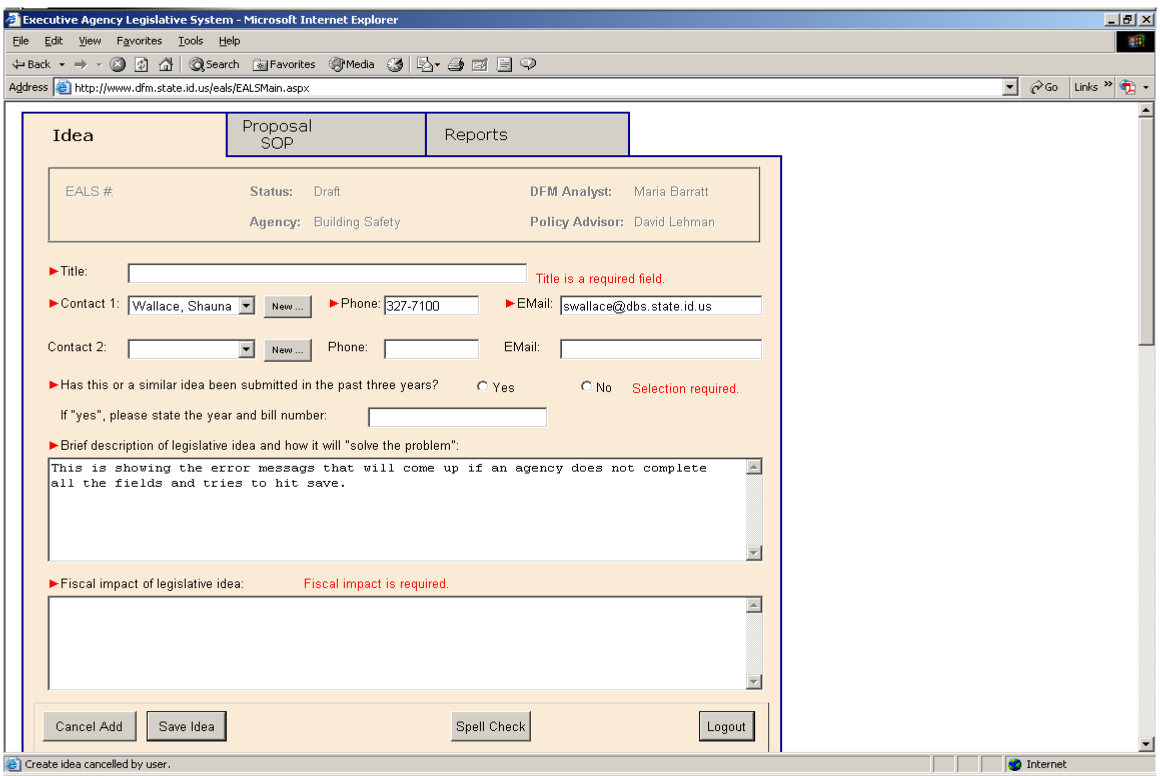
Similar Idea: Is this a new idea, or has something similar been worked on in the past three years? If this is a new idea, select no and move onto the brief description box. If this is something that has been introduced within the past three years, select yes and fill in the next box with the year and bill number if it made it that far in the process. If the idea and or proposal was submitted but not approved, please indicate the year and reference it did not make it to bill status.

Brief Description: This box is to be used to explain the idea. What problem or issue is this idea addressing? Why is this change needed now? What are the advantages and disadvantages of this idea? Who will benefit? Etc…

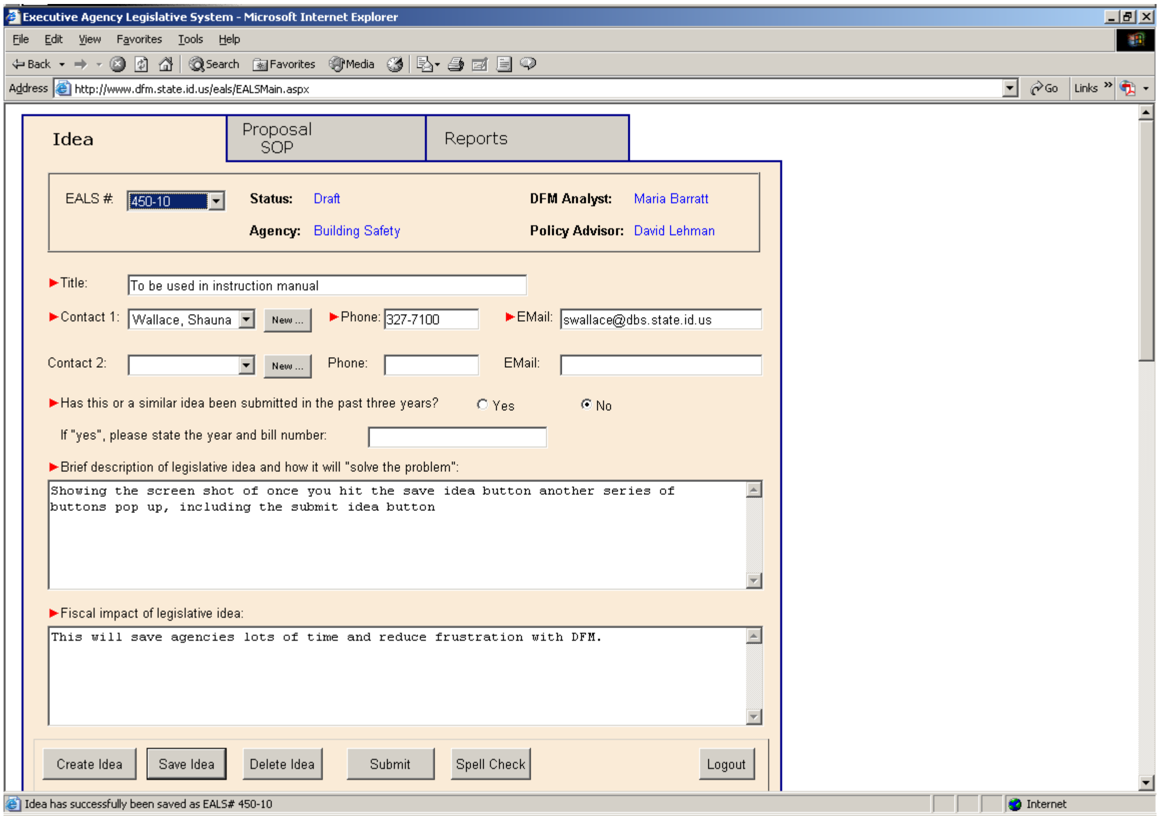
Fiscal Impact: This box is to be used to explain the potential fiscal impact from this idea (include FTP's if applicable). Do not use terms such as TBD (To be determined) or N/A. The fiscal impact needs to be filled out for ALL funding sources, not just General Fund. Ideas and or Proposals will be rejected if the fiscal notes are inadequate.

Be sure to save your data before selecting a different tab, or creating a new idea.

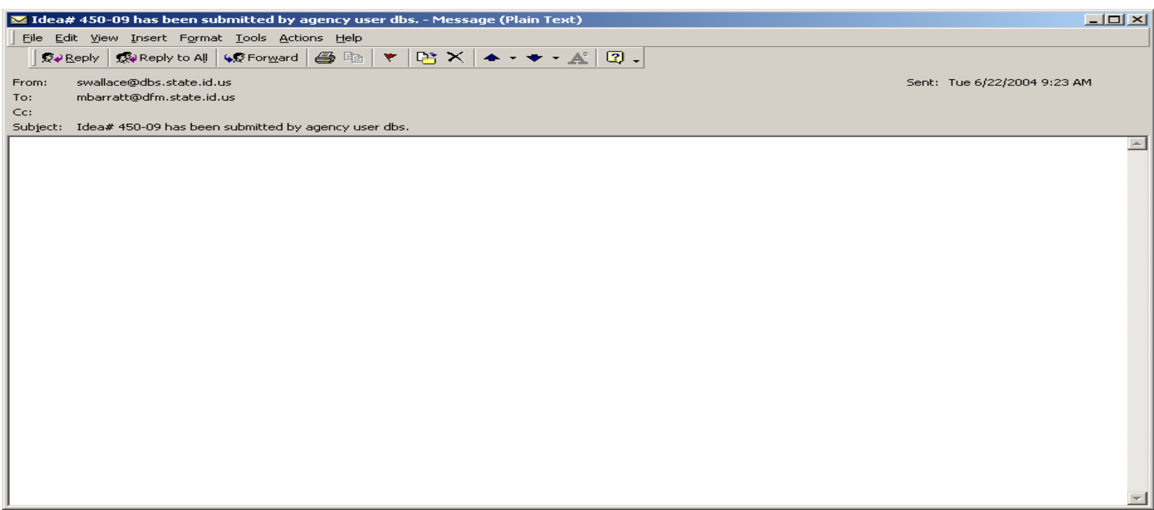
The screen print below shows the error message the system will produce if any data is missing. See comments next to the text boxes for the title, prior year, and the fiscal impact.



Once all the information has been entered and saved, a new set of buttons will appear at the bottom of the screen. This includes a "delete idea" and "submit" button.



When the agency is ready to submit the idea, select the "Submit" button. This will save any changes you just made to the idea and will generate an automatic email to your budget analyst informing them the idea is ready for review.

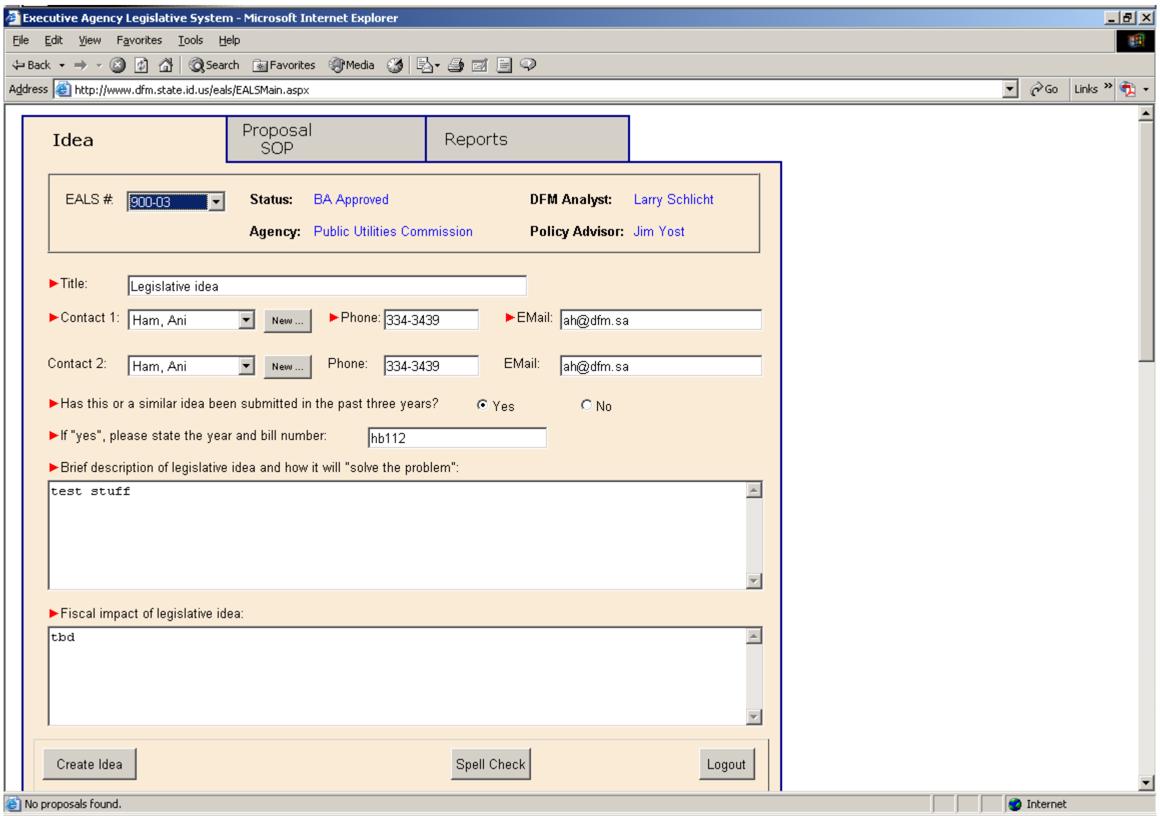


Special features of the new system

There are a couple of special features of the new EALS. The top portion of the screen has the EALS # box, a status box, a DFM Analyst box, a Policy Advisor box and an Agency name box.

The EALS # box will automatically be assigned a number by the system each time the create button is selected. This number will be used to bring up the idea or proposal for changes, updates, or tracking by the agency.

The Status box should be extremely useful for agencies. This box shows the status of each idea and proposal. It will change from draft to submitted once the agency submits the idea to DFM. Then the box will reflect DFM's action once reviewed by the analyst. The box below shows an idea that has been approved by the DFM analyst, so it is now waiting for review from a Policy Advisor in the Governor's office.



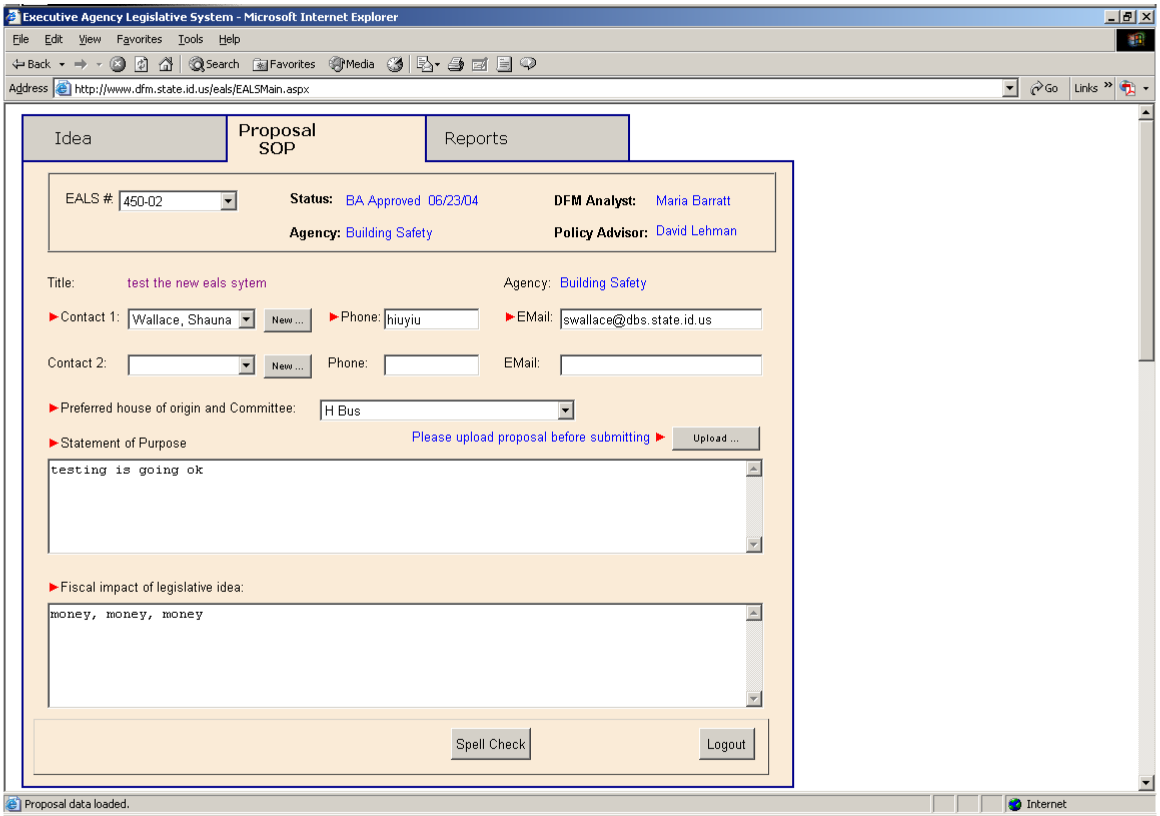
This feature will eliminate the uncertainty of where in the process each idea and or proposal is for the agencies. Agencies will be able to open the system and check the status of their own ideas and proposals.

The Agency box, DFM Analyst and Policy Advisor boxes are just informational for the agency.

The Legislative Proposal

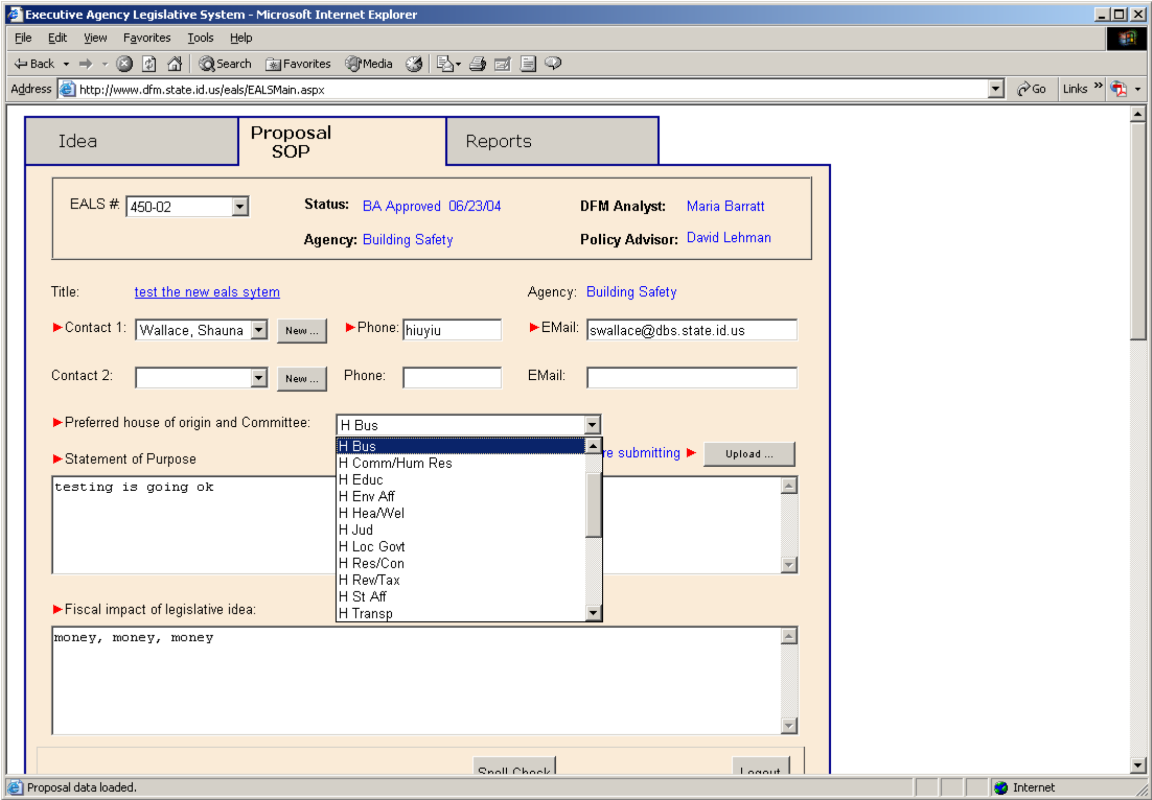
The second tab in the EALS is the **Proposal SOP** tab. Once an idea has received final approval from the DFM Analyst and Policy Advisor, the system will automatically transfer the necessary information to the Proposal SOP tab.

You ***cannot*** create a proposal without first creating an idea and having it approved.



The system will auto populate the title and contact information. You can change the contact information if needed, or create a new contact.

You will have to select a Preferred house of origin and committee. The drop down button will give you a list of all possible choices.



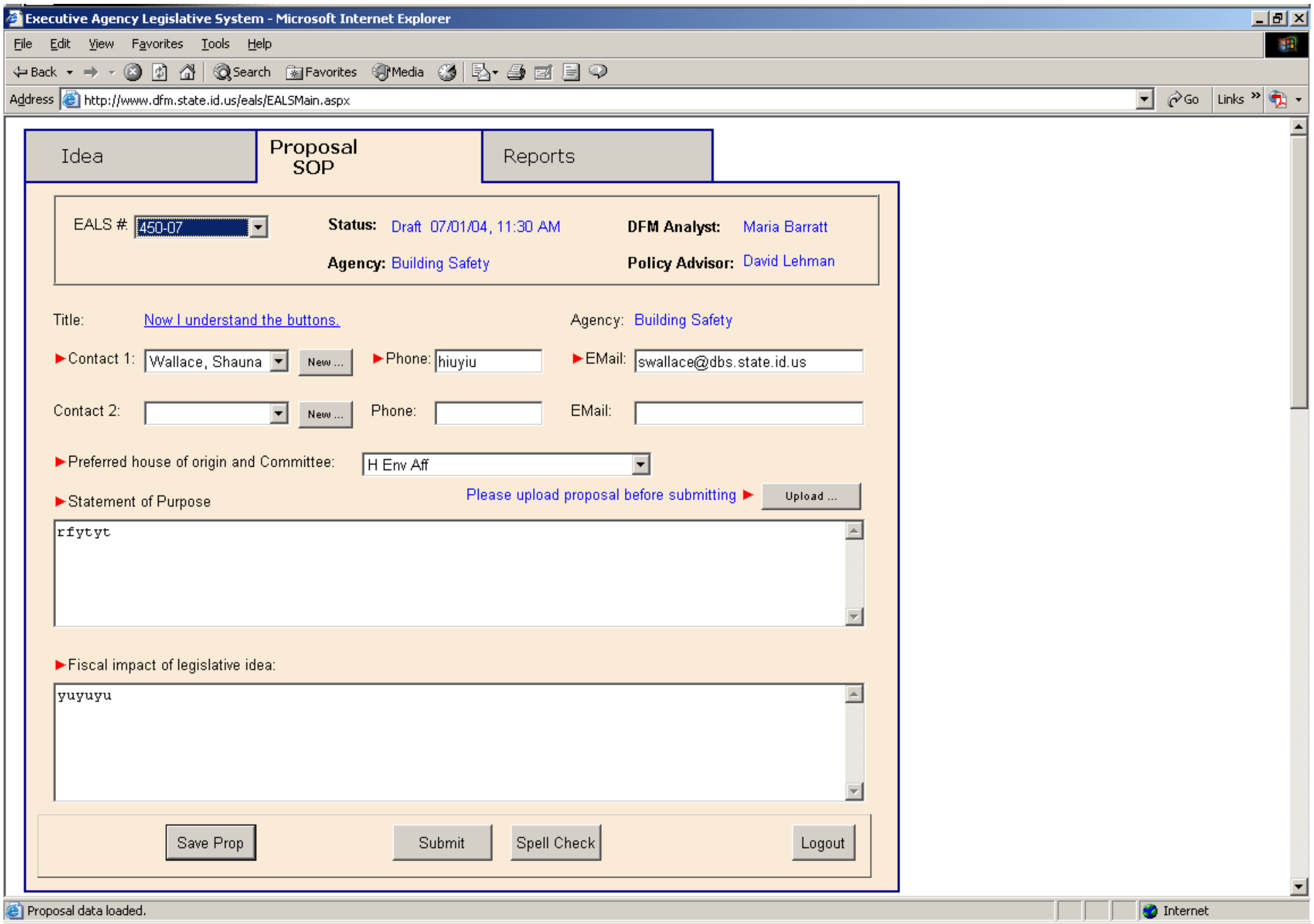
The statement of purpose is a brief description of the legislation proposal; it should answer the question, “What is this legislation trying to accomplish? ”.

The statement of purpose must be written exactly as it will appear on the attachment to the actual bill.

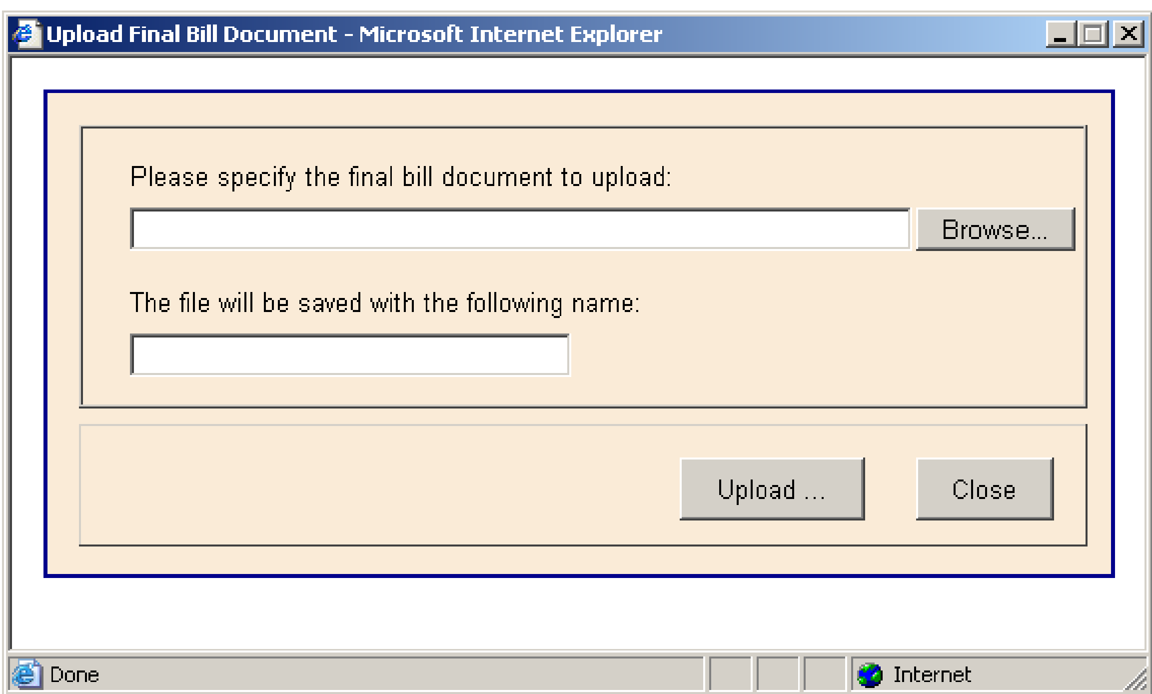
The fiscal impact is a mandatory field. It must address the fiscal impacts of all funds (including FTP’s), not just the General Fund. The system will not allow you to submit a proposal unless this field is completed. Terms such as “to be determined”, “minimal”, or “N/A” will be rejected. The fiscal note must be precise and written exactly as it will appear on the attachment to the actual bill.

Joint Rule 18 further addresses the needs of the fiscal impact statement and statement of purpose. There is a copy of the rule in the Legislative Process Memo distributed earlier by DFM.

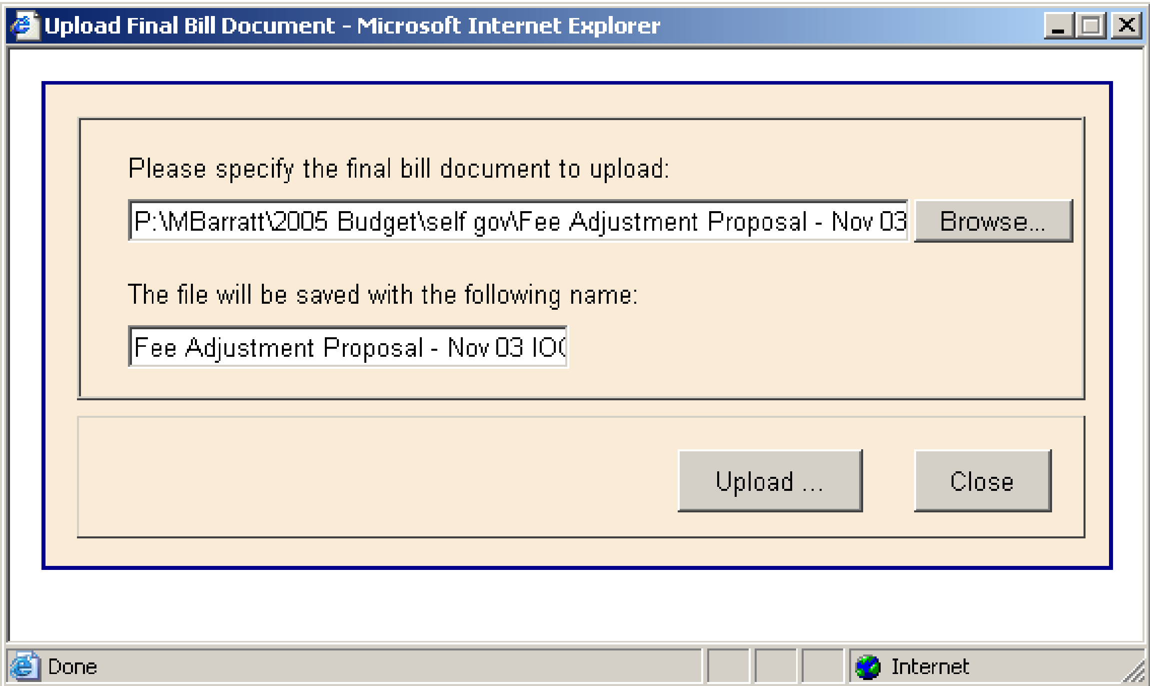
The final piece of information for the proposal SOP screen is to upload the ***<u>FINAL</u>*** draft of the changed legislation. This system will automatically load your proposed legislation into the database, so there is no need for email with attachments.

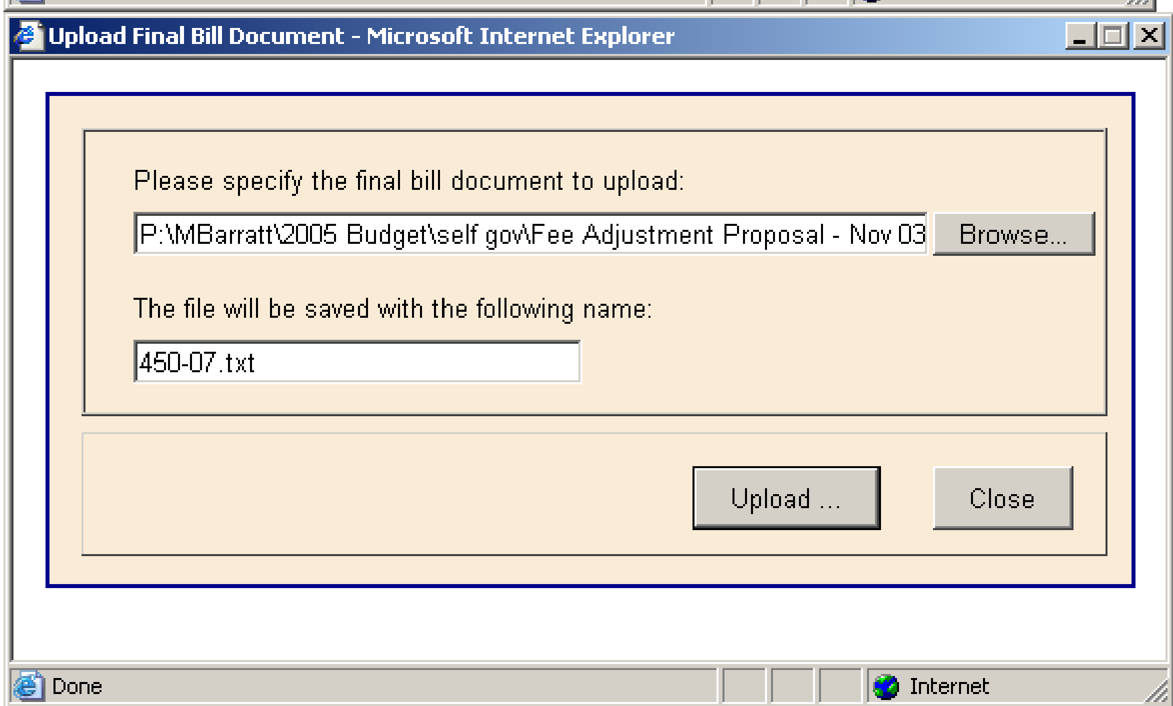


Select the “upload” button to attach your legislation file. This file should be your final draft that is ready to be sent to the committee.

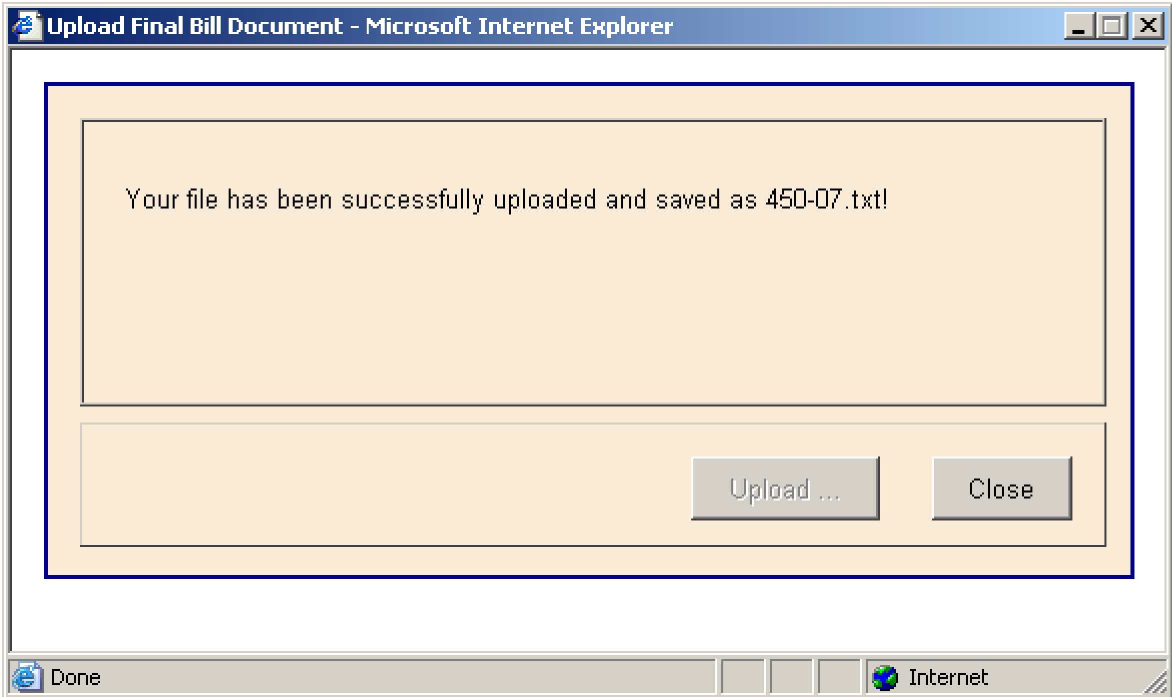


Click the “Browse” button to attach your word file. The second text box asks for a new file name. The system will automatically populate the field with the file name. Agencies will need to be sure to change the file name to match the proposal number to avoid duplicate files in the database. Make sure to give it a valid file name with an extension (i.e. 450-02.doc, 450-05.txt or 450-09.pdf).

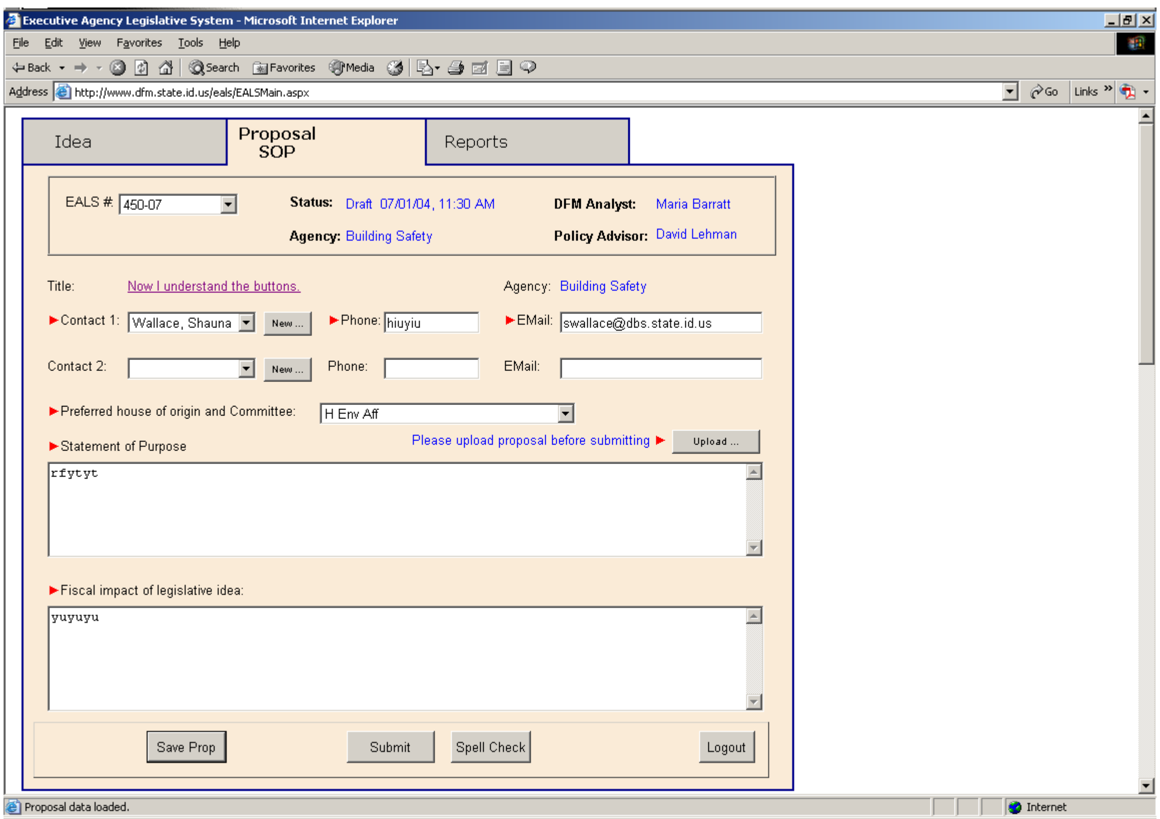




Remember the naming convention for the file needs to match the proposal number in the system. Once the correct file has been selected and the name changed, select the “upload…” button.



Legislative Services can provide copies of existing statutes or sections of the *Idaho Code* can be downloaded from the Internet at www.state.id.us/legislat/legislat.html. Refer to the Legislative Manual for more information on how to draft text for proposed legislation.



Once you have entered all the information into the text fields and uploaded your ***FINAL*** draft legislation, save and submit your proposal.

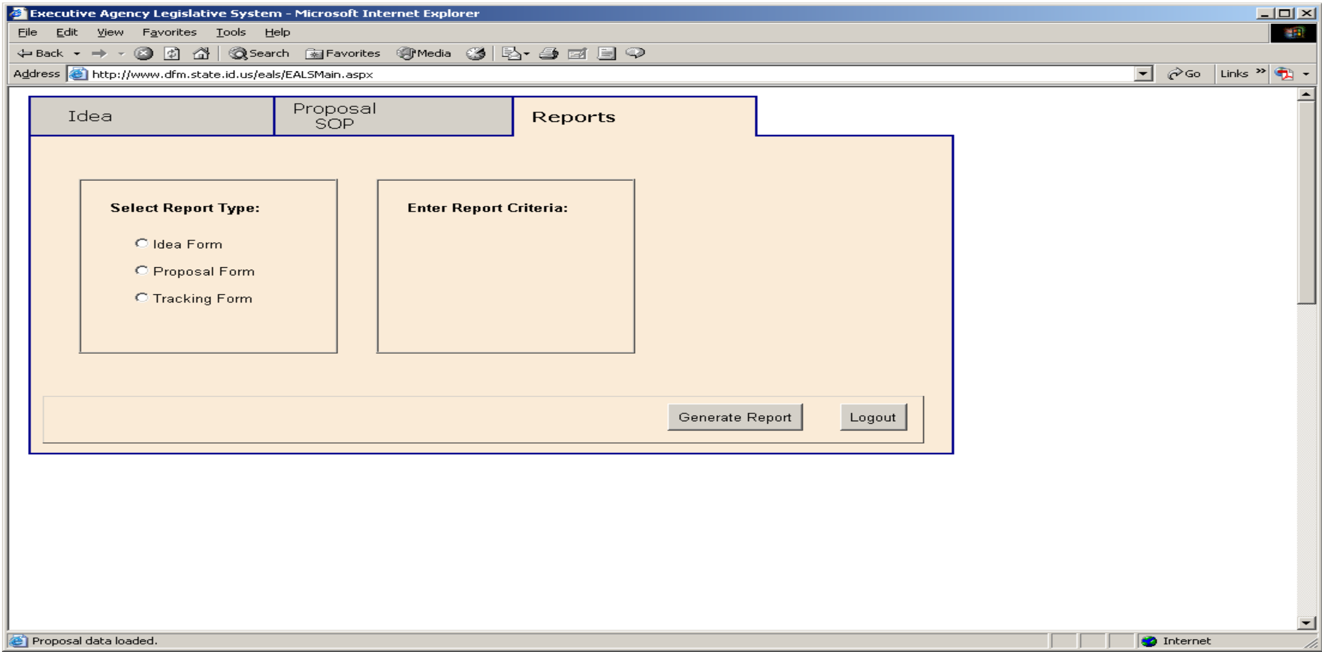
Special features of the new system

Once the file has been uploaded, you will notice a change to the title of the proposal. The title is now underlined, like a web link. If you click on the title the system will take you to the attached file.

The Status box on the proposal tab is separate from the one of the idea tab. This box will track the proposal from the agency creating the proposal to DFM and the Policy Advisor reviews. The status will update from draft to submitted once the agency submits the proposal to DFM. Then the box will reflect DFM's action once reviewed by the analyst.

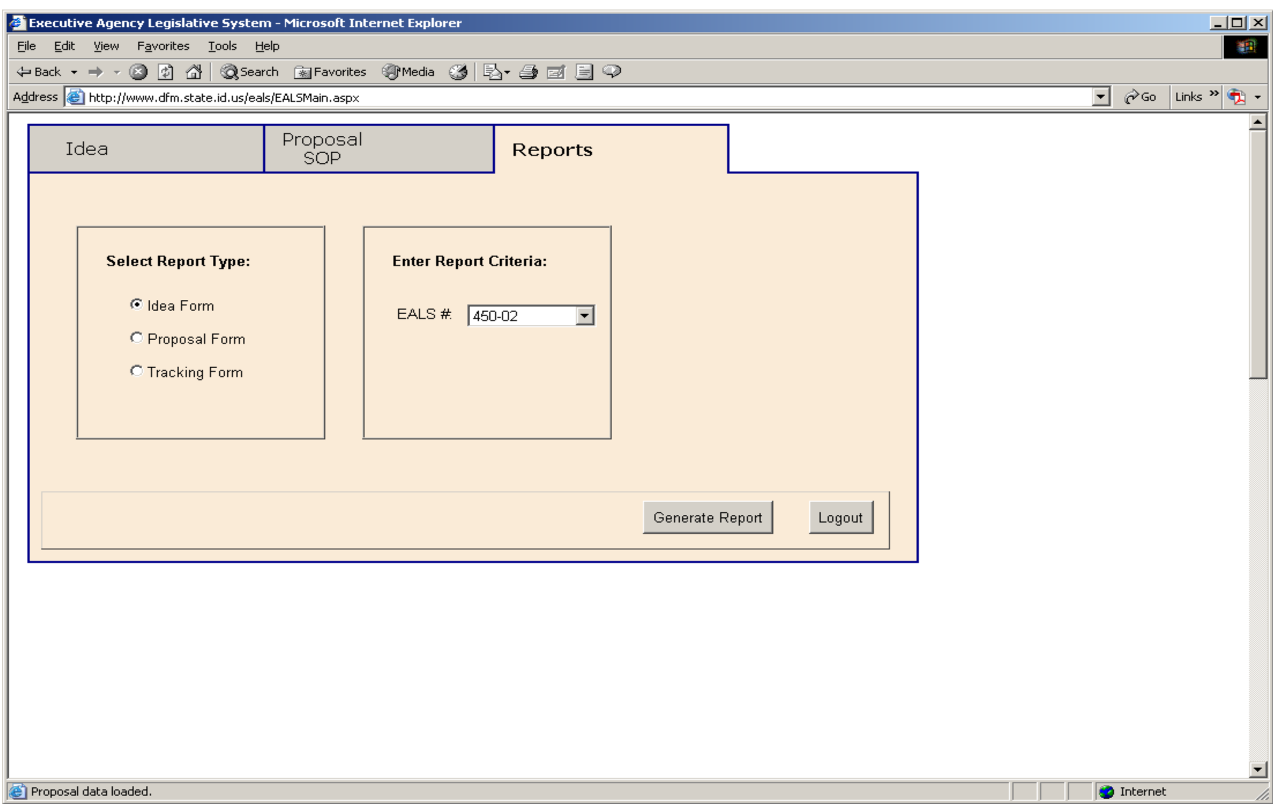
The Reports

There are three types of reports available: the Idea form, Proposal SOP form, and the Tracking form.

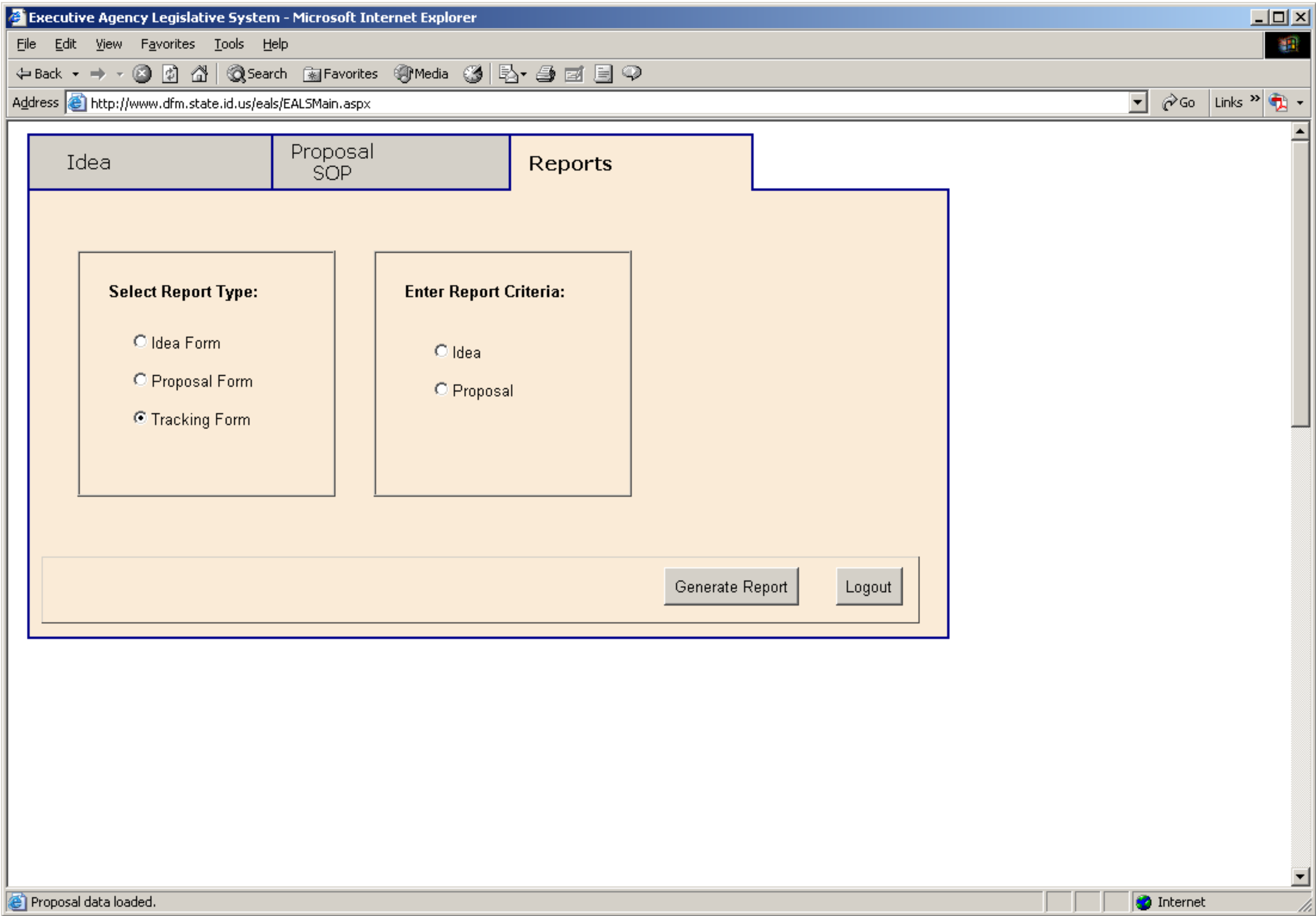


S

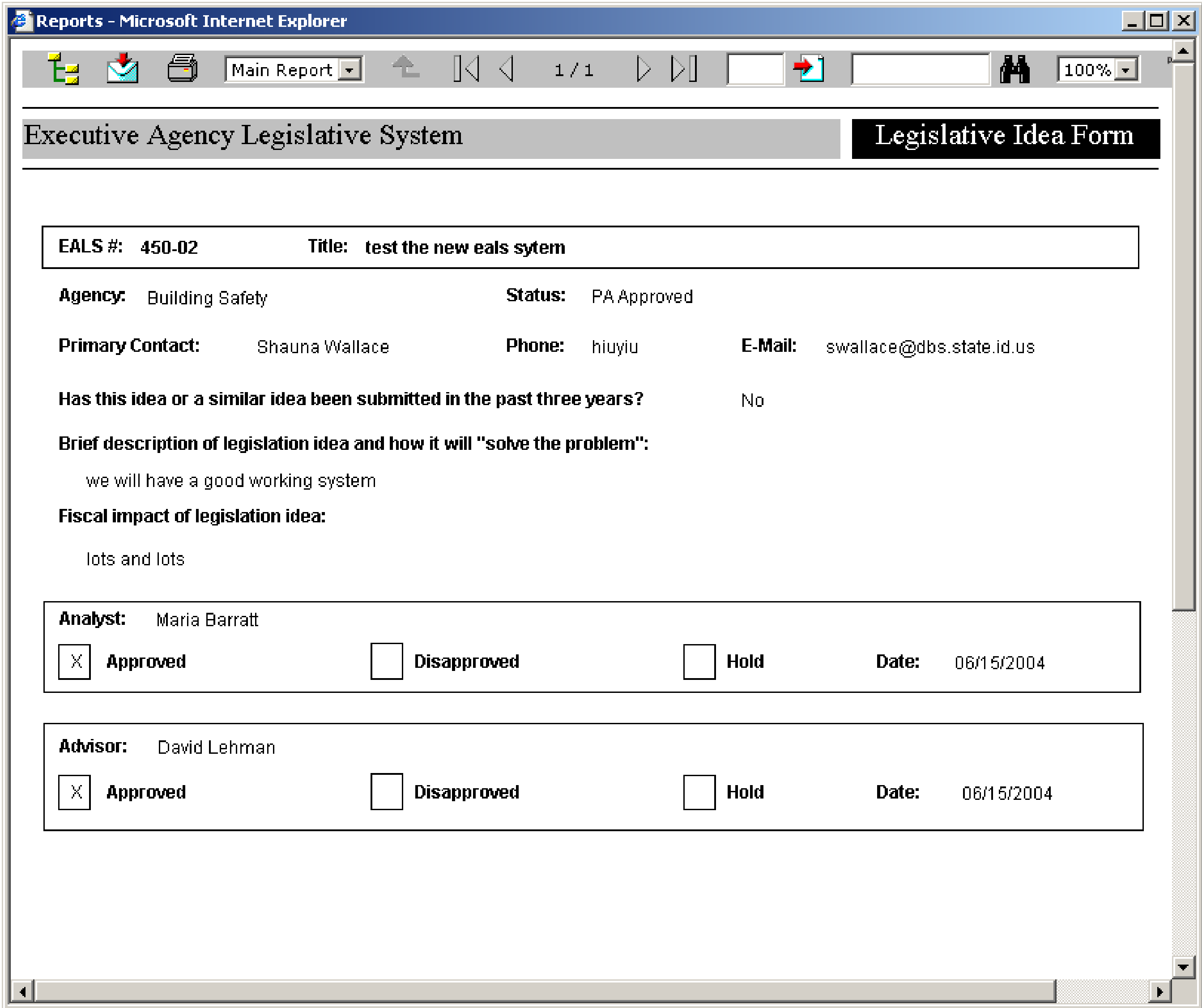
Select the radio button corresponding to the type of report you want to access. When you select the type of report a text box will open up on the Report Criteria side. For the idea and proposal reports the criteria box will require you to enter the idea /proposal EALS #.



The Tracking Form report is a summary report. You can create a summary for either all the agency ideas or proposals.



After selecting the type of report and the necessary criteria, select the "Generate Report" button. There are examples of the available on the following pages.


Reports - Microsoft Internet Explorer

Main Report 1 / 1 100%

Executive Agency Legislative System

Legislative Idea Form

EALS #: 450-02 **Title:** test the new eals sytem

Agency: Building Safety **Status:** PA Approved

Primary Contact: Shauna Wallace **Phone:** hiuyiu **E-Mail:** swallace@dbs.state.id.us

Has this idea or a similar idea been submitted in the past three years? No

Brief description of legislation idea and how it will "solve the problem":

we will have a good working system

Fiscal impact of legislation idea:

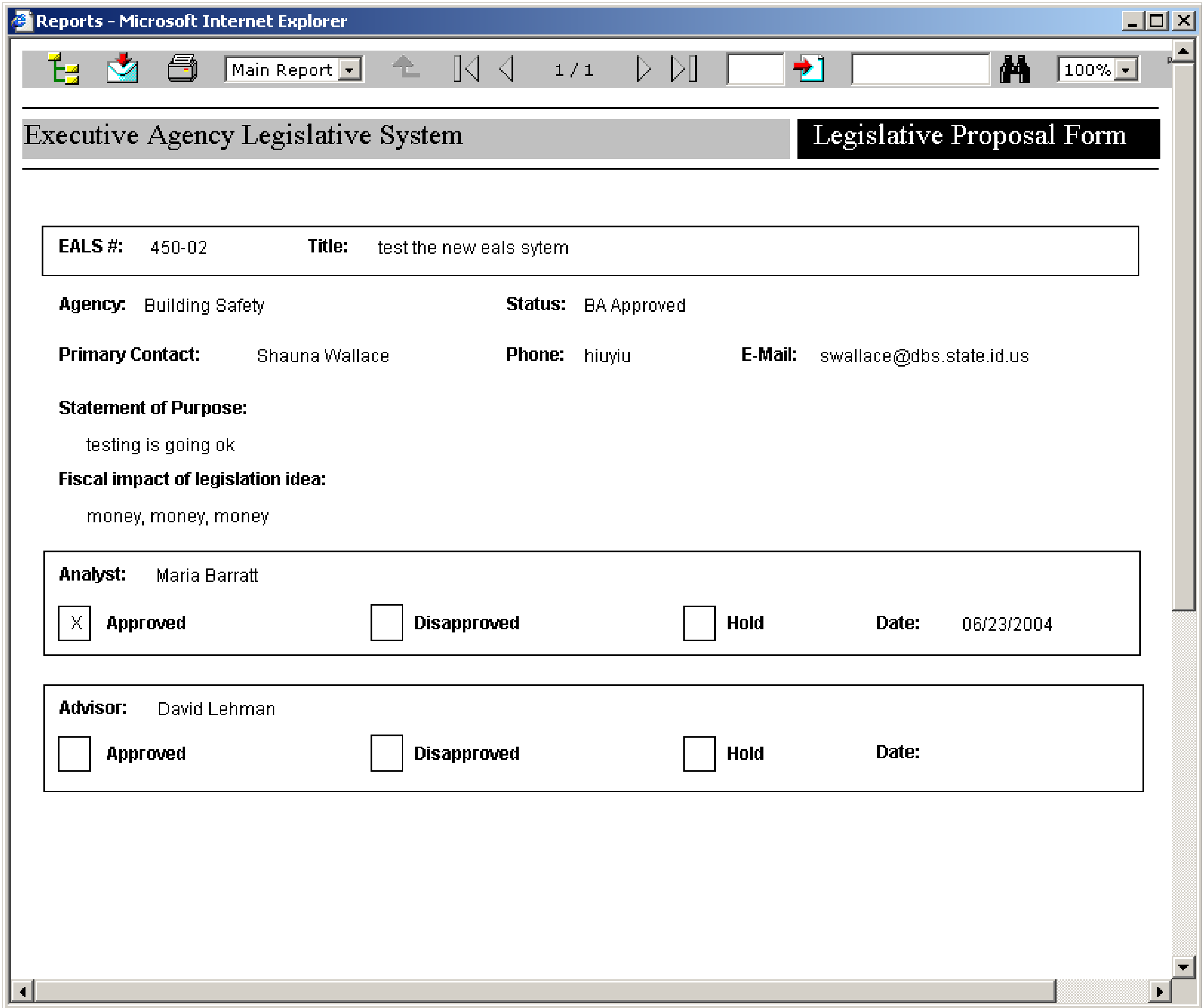
lots and lots

Analyst: Maria Barratt

X **Approved** ☐ **Disapproved** ☐ **Hold** **Date:** 06/15/2004

Advisor: David Lehman

X **Approved** ☐ **Disapproved** ☐ **Hold** **Date:** 06/15/2004


Reports - Microsoft Internet Explorer

Main Report 1 / 1 100%

Executive Agency Legislative System | Legislative Proposal Form

EALS #: 450-02 **Title:** test the new eals sytem

Agency: Building Safety **Status:** BA Approved

Primary Contact: Shauna Wallace **Phone:** hiuyiu **E-Mail:** swallace@dbs.state.id.us

Statement of Purpose:

testing is going ok

Fiscal impact of legislation idea:

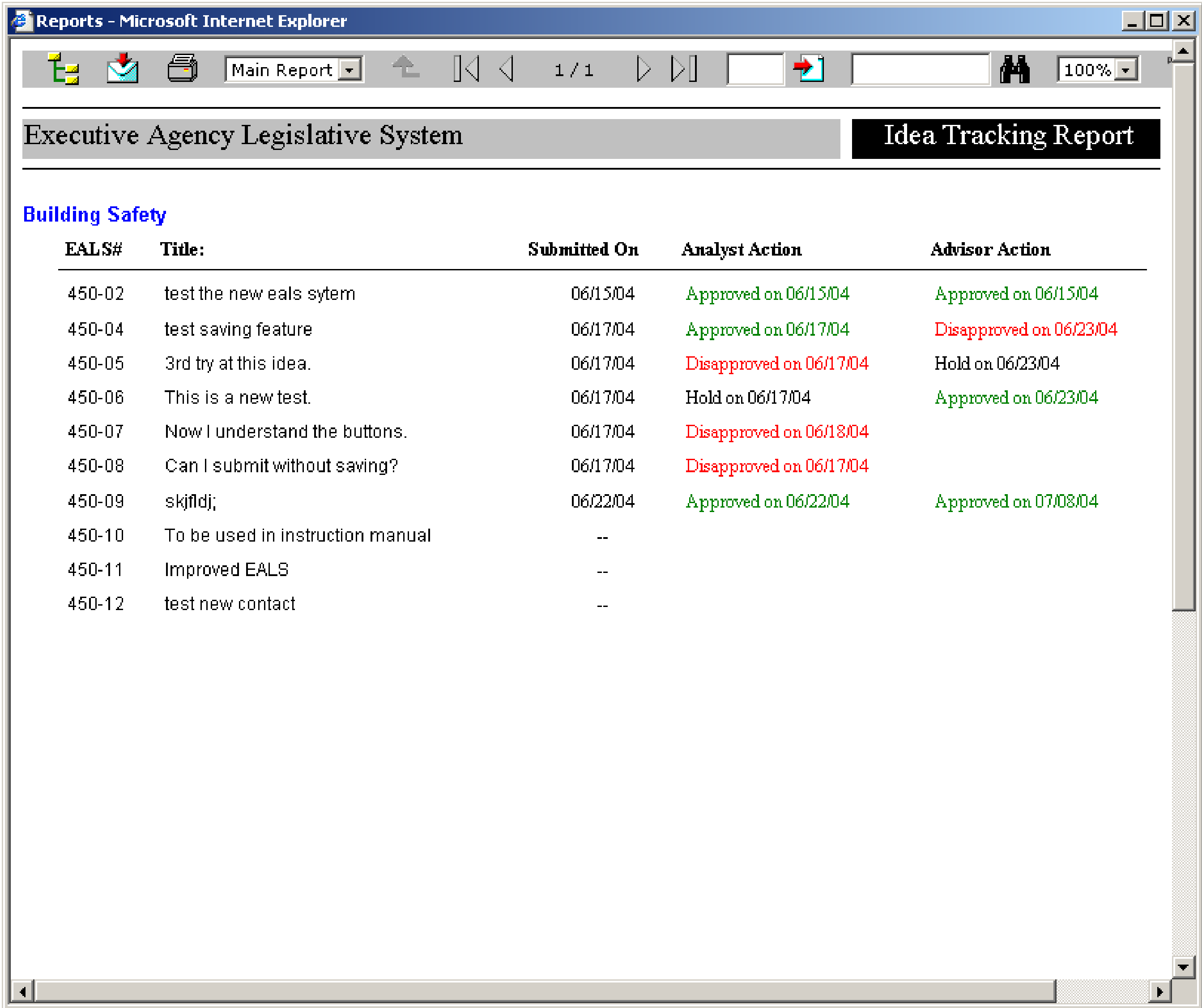
money, money, money

Analyst: Maria Barratt

[X] **Approved** [ ] **Disapproved** [ ] **Hold** **Date:** 06/23/2004

Advisor: David Lehman

[ ] **Approved** [ ] **Disapproved** [ ] **Hold** **Date:**



Reports - Microsoft Internet Explorer

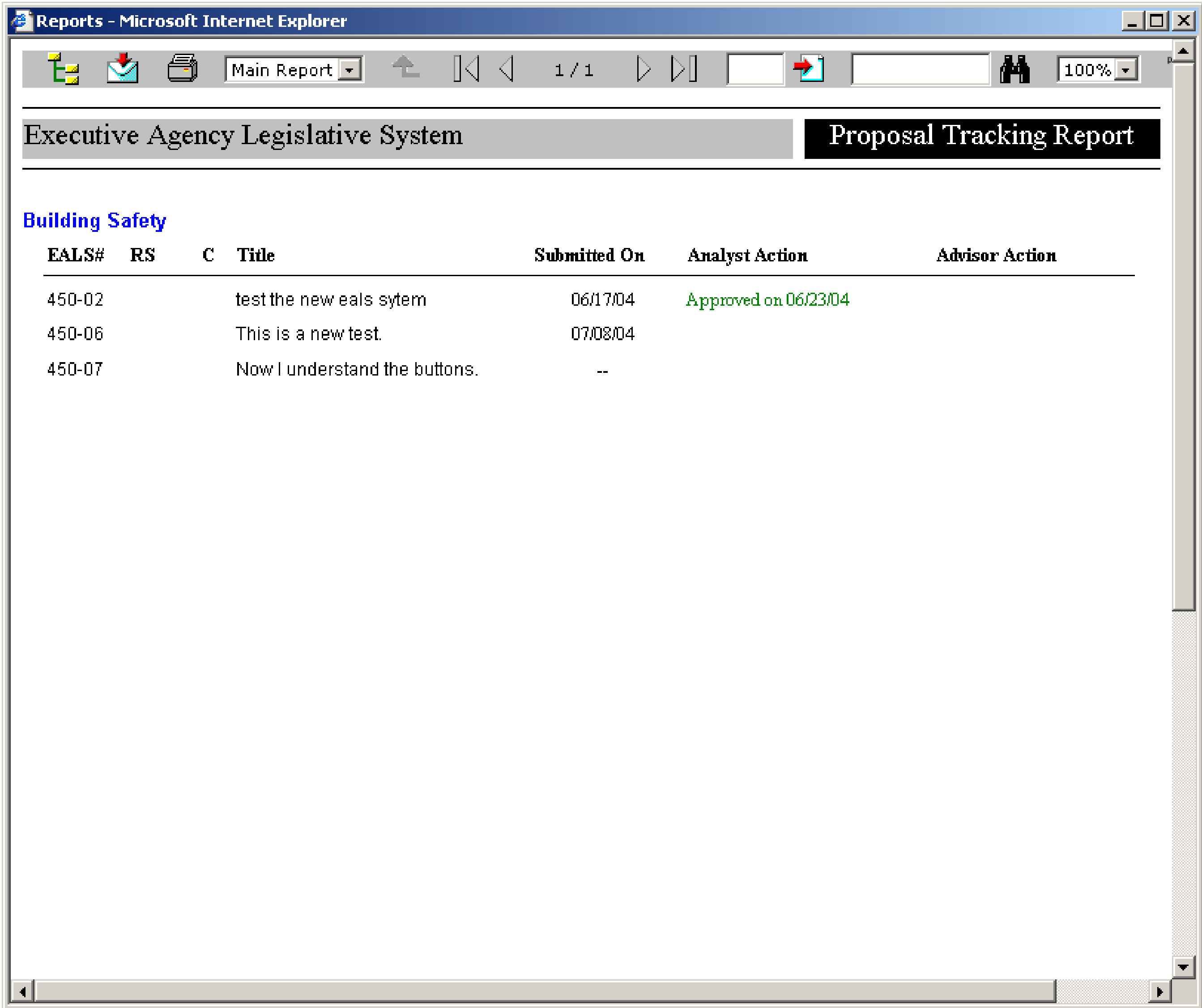
Main Report 1 / 1 100%

Executive Agency Legislative System

Idea Tracking Report

Building Safety

EALS#	Title:	Submitted On	Analyst Action	Advisor Action
450-02	test the new eals sytem	06/15/04	Approved on 06/15/04	Approved on 06/15/04
450-04	test saving feature	06/17/04	Approved on 06/17/04	Disapproved on 06/23/04
450-05	3rd try at this idea.	06/17/04	Disapproved on 06/17/04	Hold on 06/23/04
450-06	This is a new test.	06/17/04	Hold on 06/17/04	Approved on 06/23/04
450-07	Now I understand the buttons.	06/17/04	Disapproved on 06/18/04	
450-08	Can I submit without saving?	06/17/04	Disapproved on 06/17/04	
450-09	skjfldj;	06/22/04	Approved on 06/22/04	Approved on 07/08/04
450-10	To be used in instruction manual	--		
450-11	Improved EALS	--		
450-12	test new contact	--		


Reports - Microsoft Internet Explorer
Main Report
1 / 1
100%
Executive Agency Legislative System
Proposal Tracking Report
Building Safety
EALS# RS C Title Submitted On Analyst Action Advisor Action
450-02 test the new eals sytem 06/17/04 Approved on 06/23/04
450-06 This is a new test. 07/08/04
450-07 Now I understand the buttons. --